

# Missouri Public Library Standards

## *An Implementation Plan*



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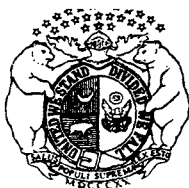
## *An Implementation Plan*

MISSOURI STATE LIBRARY  
JEFFERSON CITY, MISSOURI

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*December 1999*



STATE OF MISSOURI  
**OFFICE OF SECRETARY OF STATE**  
JEFFERSON CITY 65102

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Dear Missourians:

*Charting Missouri's Library Future; Into the New Century*, in the chapter "Charting the Improvement of Current Library Services," includes a map indicating "Missouri libraries have standards which to evaluate progress and build strength."

Work has been under way for some time to create a set of standards for Missouri public libraries. This document, *Public Library Standards; An Implementation Plan*, will guide public libraries on their journey down a route which will lead to improved public library service for the new century.

Standards were first drafted by the Public Library Council of the Missouri Library Association and adopted by the association. These were presented to me for consideration. I have approved these standards as a policy of best practice. After careful evaluation, further input from the library community and planning by our staff, this implementation plan was created.

We are pleased to announce the adoption of these standards and the plan for their implementation as part of our work toward enhancement of public library service to the residents of our state.

It will take time and effort to enable our public libraries to meet these standards. Boards of trustees and those who direct libraries should find these standards important as a tool toward excellence. Please join us on this journey which will discover the strengths of our public libraries and enable us to build on them.

A handwritten signature in black ink that reads "Rebecca McDowell Cook".

Rebecca McDowell Cook  
Secretary of State

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# Introduction

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During the 1993 Missouri Library Association conference, the Public Library Council directed the formation of a committee to investigate the need for standards for public libraries. At its first meeting in April 1994, the Standards Committee decided that new standards were in order.

The committee felt its work must be driven by two fundamental concerns. First, the new standards must be a means for the Missouri public library community to accomplish the following tasks:

1. To stimulate the growth and development of public libraries and to provide a tool to be used in the development of goals.
2. To motivate the improvement of quality and the effectiveness of service.
3. To develop a concern and appreciation for the necessity of evaluation and public accountability.
4. To provide a vehicle for eliminating barriers as well as a reminder that all Missouri citizens need and deserve quality library service.

The committee's second concern was based on the recognition that the writing of public library standards raises complex issues and engages different opinions and perspectives. The committee sought input from a number of different sources. Suggestions from the Missouri Public Library Directors, the Library Advisory Committee, Summer Institute participants, and other public librarians have been incorporated into the document.

The standards document was adopted by the Missouri Library Association at its 1996 annual conference. The association transmitted the document to Secretary of State Bekki Cook for consideration as official state standards. She has approved these standards as a policy of best practice.

The standards document represents an attempt to codify a sense of ideal library practice in concrete terms. The standards themselves are written as statements of the conditions necessary for effective library service. The standards are supported by guidelines whose achievement contributes to the creation of those conditions.

# *Use of the Standards*

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The use of the public library standards requires strong commitment on the part of the library director and the board of trustees. The implementation plan begins with the standards which do not require significant additional funding. A library can achieve these standards by time, energy and leadership. Securing additional funding requires significant efforts at the local and state level. To support those efforts, it is vital that public libraries provide a strong foundation for their service.

The first commitment necessary is one of time. Library directors and trustees should plan to devote a year to studying the standards and measuring their library against this document, which will assist in enhancing the service currently offered and lead the library to the next level of service needed by its community.

Each board of trustees should divide the standards into manageable sections and devote time at each board meeting to the area chosen for dis-

cussion at that meeting. Working through the standards this way will allow trustees and directors to take a close look at the library's practices. It will provide opportunity for discussing ways to change and improve the delivery of service.

This document will serve well as an evaluation tool. As the trustees and library director take a close look at current plans and services, it will assist them in determining the direction in which the library should move. With this information in hand and employing long-range planning techniques, the board and administration will be able to move the library forward and make it stronger.

The Missouri State Library will begin its use of the standards by planning and coordinating continuing education activities directed toward strengthening the foundation of public libraries. First offerings will be in creating and fine-tuning bylaws and policies and in strategies for long-range planning for libraries.

# *Structure, Governance and Administration*

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All Missouri residents should have legally established, readily accessible public library service capable of connecting each individual with the comprehensive information resources of the region, state, and nation.

Public library districts are supported by property tax revenue, state funds, and funds from a variety of other sources. Because it takes more money on a per capita basis to run a small library than a large one, many communities cannot raise sufficient funds to support the measure of service set forth in the Missouri Standards for Public Library Service.

Where the level of financial support makes it impossible to meet these measures, alternative methods of providing library service should be considered. For example, combining small localities into a larger library unit or contracting for local service with an existing, strong library unit are ways to make effective library services available to any community, regardless of size. In order to provide local funding for public libraries, the district tax rate should be increased if the existing levy proves inadequate. Further financial support may be sought from various public agencies and from the private sector.

Public libraries are established and maintained according to the provisions of the Missouri statutes and are governed under special districts which may combine into regional agreements. All Missouri public library districts are governed by library boards or as otherwise provided by law. Trustees observe their full legal responsibilities, duties, and rights by holding regular meetings, employing legal and other counsel as necessary, and attending board meetings regularly. The board has complete authority, within legal limits, over the library district's budget. The board follows statutory requirements as to fiscal year audit, annual and other reports, and the budgeting process.

## **Standards**

1. The first priority of the board is to guarantee that all residents of the library district have access to tax-supported public library services.
2. The board establishes goals and objectives and adopts bylaws, rules and regulations for its own guidance and for the governance, maintenance, and function of the library district.
3. Policies approved by the board are written and are available for public inspection.
4. The library district has a written mission statement which clearly defines the purpose of the public library in its community. The library district has written plans for long-range planning, collection development, public services, and other areas as necessary. The plans state goals and objectives for improvement of library services and are available for public inspection.
5. The board employs the library director, provides for the continuing development and evaluation of the director, and delegates active management of the library district to the director. Board members must not be involved in the day-to-day operation of the library.
6. The board sets and approves the library district budget.
7. Board meetings are held as specified in the bylaws, at a time and place convenient for the board and for the community, in accordance with Missouri state law on public meetings. The library director must attend.
8. The board complies with Missouri law and any federal laws which affect library operations. Trustees and library staff should actively participate in the legislative process to effect change that will benefit library users.
9. The board must assure that adequate records and statistics on library operation are kept.

## Guidelines

- \_\_\_\_\_ 1. The board maintains bylaws and reviews them annually.
- \_\_\_\_\_ 2. A written statement describes the responsibility of trustees and differentiates them from the responsibilities of the library director. Trustees avoid participation in the administrative or operational aspects of the library district.
- \_\_\_\_\_ 3. Trustees have staggered, finite terms of service. There is a limit on the number of consecutive terms a member may serve on the board. Bylaws provide for the mid-term replacement of trustees who cannot or do not fulfill their responsibilities.
- \_\_\_\_\_ 4. Bylaws provide the library with safeguards against conflict of interest.
- \_\_\_\_\_ 5. Meetings of the library board are held at a regularly scheduled time at least nine times a year. Board meetings are open to the public and are held in accordance with state and local laws on public meetings.
- \_\_\_\_\_ 6. The library director is present at all board meetings.
- \_\_\_\_\_ 7. Board meetings are held at a time and place convenient for board members, the library director, the community, and representatives of the library staff.
- \_\_\_\_\_ 8. The library district provides trustees with errors and omissions insurance coverage.
- \_\_\_\_\_ 9. The chair of the board provides new members with a review of the bylaws, policies, and practices of the board.
- \_\_\_\_\_ 10. The library director provides new board members with orientation to the library including a review of policies, services, physical facilities, finances, and other appropriate administrative concerns.
- \_\_\_\_\_ 11. Trustees participate in continuing education activities such as workshops and meetings sponsored by the Missouri Library Association, the American Library Trustee Association, and the Missouri State Library.
- \_\_\_\_\_ 12. There is provision in the library district budget for institutional dues to library organizations such as MLA, ALTA, and other appropriate organizations.
- \_\_\_\_\_ 13. The board, in accordance with its fiduciary responsibility as a public entity, is responsive to the community and does not act capriciously in fulfilling that responsibility.
- \_\_\_\_\_ 14. The board and the library administrative staff are familiar with and comply with Missouri library law and any other Missouri or federal laws which affect library operations, such as minimum wage, hiring practices, unemployment compensation, criminal theft of library materials, privacy, freedom of information, etc.
- \_\_\_\_\_ 15. The board carries full responsibility for the library, its budget, and its policies.



- \_\_\_\_\_ 16. The board selects and appoints the library director and conducts an annual evaluation of the director.
- \_\_\_\_\_ 17. The board and the library director jointly develop goals and objectives for the library district and a plan for achieving them.
- \_\_\_\_\_ 18. The board and the library director jointly study, plan, develop, and adopt library policies and regulations and review them annually. The board makes these policies and regulations available to the public.
- \_\_\_\_\_ 19. The board conducts a formal study of community needs at least every five years.
- \_\_\_\_\_ 20. The board and the library director conduct a user survey to determine library user needs at least every three years.
- \_\_\_\_\_ 21. The board plans for execution and maintenance of adequate records on library operation, including those statistics and records as delineated in Missouri Records Management Law and those required by city and county government, the Missouri State Library, the American Library Association, and other agencies that collect library data.
- \_\_\_\_\_ 22. The minutes of the meetings of the library board are made available to the public and staff at the library.
- \_\_\_\_\_ 23. Trustees and library staff actively participate in the legislative process to effect change that will benefit libraries.
- \_\_\_\_\_ 24. The board provides adequate funding for the space, staffing, equipment, and materials needed for library programs and services.
- \_\_\_\_\_ 25. The board encourages and develops ongoing trust, foundation and endowment funding, the income of which will enhance and supplement the library district's ability to deliver programs and services.
- \_\_\_\_\_ 26. The board provides the staff with safe working conditions and appropriate continuing education opportunities.
- \_\_\_\_\_ 27. The board provides salaries competitive with local school and city salary schedules where education, job description, level of responsibility, and experience are comparable.
- \_\_\_\_\_ 28. The board provides salary schedules based upon measurable criteria such as levels of achievement, years of service, and college or continuing education hours/degrees.
- \_\_\_\_\_ 29. The board ensures that all library district services, programs, materials, and facilities are secured at reasonable cost and do not unnecessarily duplicate similar activities within the library district's jurisdiction.

# *Responsibilities of the Library Board in Relation to the Responsibilities of the Library Director*

Source: *The Library Trustee*. Virginia Young. Used with permission.

## **Library Board**

Employ a competent and qualified librarian.

Determine and adopt written policies to govern the operation and program of the library.

Determine the purposes of the library and secure adequate funds to carry on the library's program.

Know the program and needs of the library in relation to the community; keep abreast of standards and library trends.

Establish, support, and participate in a planned public relations program.

Assist in the preparation of the annual budget.

Know local and state laws; actively support library legislation in the state and nation.

Establish among the library policies those dealing with book and material selection.

Attend all board meetings and see that accurate records are kept on file at the library.

Attend regional, state, and national trustee meetings and workshops, and affiliate with the appropriate professional organizations.

Be aware of the services of the state library.

Report regularly to the governing officials and the general public.

## *Library Director*

*Act as technical advisor to the board; recommend needed policies for board action; recommend employment of all personnel and supervise their work.*

*Carry out the policies of the library as adopted by the board.*

*Suggest and carry out plans for extending the library's services.*

*Prepare regular reports embodying the library's current progress and future needs.*

*Maintain an active program of public relations.*

*Prepare an annual budget for the library in consultation with the board and give a current report of expenditures against the budget at each meeting.*

*Know local and state laws; actively support library legislation in the state and nation.*

*Select and order all books and other library materials.*

*Attend all board meetings other than those in which the director's own salary or tenure are under discussion; may serve as secretary of the board.*

*Affiliate with the state and national professional organizations and attend professional meetings and workshops.*

*Make use of the services and consultants of the state library.*

*Report regularly to the board, to the officials of local government, and to the general public.*

# Finance

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Library districts maintain local effort for financial support, present and administer a budget, present monthly financial reports to board and public, are audited, and maintain insurance adequate for the protection of the district staff and board.

## Standards

1. The library district has a minimum tax rate of \$.15 per hundred dollars of assessed valuation, or a minimum per capita support of \$15.00 per capita from all local funds.

2. The library district follows fiscal procedures consistent with state law in preparing, presenting, and administering its budget.

3. The library district is annually audited by an independent C.P.A. firm with experience in governmental accounting.

4. The library district has insurance adequate to protect the district and its public.
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## Guidelines

- \_\_\_\_\_ 1. Surplus funds of the library district are optimally invested within the legal parameters established by Missouri statutes and investment plans are reviewed annually.

\_\_\_\_\_ 2. The library district complies with State Library requirements for reporting budget figures.

\_\_\_\_\_ 3. Support from other local government entities, or grants and donations, may be used as local support.

\_\_\_\_\_ 4. State and federal funding is not counted in calculating local support.

\_\_\_\_\_ 5. Per capita support is expressed in 1996 dollars and is regularly adjusted for inflation.

\_\_\_\_\_ 6. The board of trustees of the library district reviews and adopts an annual written budget presented by the director of the library district.

\_\_\_\_\_ 7. Copies of the budget document are made available to the State Library and the district's board-appointing bodies.

\_\_\_\_\_ 8. Monthly documents reflecting budgetary balances and expenditures are presented to the board of trustees of the library district.

\_\_\_\_\_ 9. The library district makes budgetary and reporting documents available for easy inspection by the public.

\_\_\_\_\_ 10. The library district, as a corporate body and political subdivision of the State of Missouri, certifies a tax rate in a manner prescribed by the *Revised Statutes of Missouri*.

\_\_\_\_\_ 11. Accounting firms providing audits should be familiar with rulings by the Governmental Accounting Standards Board.

\_\_\_\_\_ 12. An audit and management letter is sent to the State Library, the State Auditor, and the district's board-appointing bodies.

\_\_\_\_\_ 13. The library district makes auditing and management documents available for inspection by the public.

\_\_\_\_\_ 14. The library district maintains liability insurance.

\_\_\_\_\_ 15. The library district bonds staff and officials with access to significant money.

\_\_\_\_\_ 16. The library district carries an errors and omissions policy on its board and staff.

# Personnel

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Personnel are the library district's most valuable resources and usually account for the largest portion of the budget. Library staff are responsible for carrying out the mission and the service plan of the library. All library staff should be competent, well trained, and able to provide high-quality service in a friendly and courteous manner.

## Library Director Requirements

A master's degree from a library school accredited by the American Library Association or a comparable master's degree in information technology or public management.

### Alternatively, for small communities

A Bachelor of Arts or Bachelor of Science degree plus one of the following: enrollment in an ALA/MLS program; school library certification; completion of the State Library's Summer Institute basic class, administration class, and two additional classes.

*If none of the above apply, a process to appeal for a waiver of these requirements will be developed. Consideration will be given to an equivalent degree, previous experience and education, in com-*

*bination with agreement to participate in appropriate continuing education.*

## Standards

1. The library board is responsible for hiring a paid, qualified director or administrative officer for the library district. Normally, this position is filled by a person with a Master of Library Science degree from a program accredited by the American Library Association. (See Library Director Requirements)
2. The director is responsible for employing qualified personnel to fulfill the mission of the library district.
3. The library district has written personnel policies and procedures.
4. Staff development and continuing education opportunities are regularly available to all staff members.
5. Volunteer programs have written policies, procedures, and job descriptions that explain and govern the role of all volunteers.
6. The library personnel policies comply with federal and state laws and encourage diversity.

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## Guidelines

- \_\_\_\_\_ 1. The numbers and levels of staff members are sufficient to carry out the service plan of the library district.
- \_\_\_\_\_ 2. Written job descriptions clearly define all staff positions. Job descriptions include essential functions, educational requirements, and necessary experience directly related to the library district's service plan.
- \_\_\_\_\_ 3. Supervisors regularly evaluate all staff members based on written job descriptions.
- \_\_\_\_\_ 4. The library district encourages and supports diversity in personnel.
- \_\_\_\_\_ 5. Educational experiences keep library personnel abreast of knowledge and developments within the field, enhance job competence, or lead to specialization in new areas of librarianship.
- \_\_\_\_\_ 6. Staff members who participate in appropriate continuing education activities, subject to library district needs, may be supported through paid leave, release time, fee reimbursement, expenses, etc., as outlined in the library district's personnel policies manual.

- \_\_\_\_\_ 7. Library staff participate in statewide library activities.
- \_\_\_\_\_ 8. Volunteers enhance library district programs and services and do not substitute for paid staff.
- \_\_\_\_\_ 9. Volunteers are appraised on a regular basis throughout their association with the library district.
- \_\_\_\_\_ 10. Management and staff who regularly assist the public will possess the skills and knowledge necessary to access statewide, national, and international computer networks, including e-mail, databases, electronic discussion lists, etc.
- \_\_\_\_\_ 11. All library staff are aware of and can direct users to sources of information outside the local library.
- \_\_\_\_\_ 12. Each public library district provides adequate time and financial support to acquire and maintain staff computer literacy.
- \_\_\_\_\_ 13. Library staff who provide reference service to users of any age participate in continuing education programs to learn about and stay current in the use of electronic information technology.
- \_\_\_\_\_ 14. Library staff who provide reference service to users of any age are well trained in conducting the reference interview for all types of reference sources, including written and electronic formats.

# Public Library Services

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The services of the public library are designed to meet the needs of the community it serves. Specific plans for library services are developed as part of the library district's long-range plan.

## Standards

1. The library district has a written service plan to meet community needs, developed by the board and staff with input from the community.
2. Library hours are set to meet community needs and include morning, afternoon, evening, and weekend hours each week. Full library services are available to all individuals regardless of age.
3. The library district has a written lending policy which specifies freedom of access, types of materials which are loaned, citizen eligibility for library borrowing privileges, and requirements for those residing outside library district boundaries.
4. The library district provides services using the information technology, whether print-based or electronic, that is most appropriate to the user's needs, regardless of the user's age.

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## Guidelines

- \_\_\_\_\_ 1. The library district's service plan includes, but is not limited to, reference and reader's advisory service, services for children, youth and families, circulation of materials, relationship with community groups, services for special populations, and literacy and outreach services. The plan specifies the materials, services, programs, and staff which will address those needs.
- \_\_\_\_\_ 2. The library district encourages input by citizens, including young adults, in the development of the service plan through advisory groups, surveys, focus interviews, or other appropriate means.
- \_\_\_\_\_ 3. The library district's annual budget reflects the service plan, providing the blueprint for meeting the community's service needs.
- \_\_\_\_\_ 4. The library district's service plan is reviewed annually by board and staff.
- \_\_\_\_\_ 5. Staff providing services participate in the planning and budgeting process.
- \_\_\_\_\_ 6. The library district's governing authority has formally adopted and follows the principles of the American Library Association's intellectual freedom statements. If the library district provides access to electronic resources, policies are adopted which incorporate the intent of these statements.
- \_\_\_\_\_ 7. The library meets or exceeds the following service hours: under 10,000 population—35 hours per week; 10,000-25,000 population—55 hours per week; over 25,000 population—65 hours per week.
- \_\_\_\_\_ 8. Service hours include morning, afternoon, evening, and weekend hours each week, and are set to meet community preference.

- \_\_\_\_\_ 9. The library district's service plan specifies how access to services is provided during all the library's scheduled hours. Reference and reader's advisory service for all ages are available on site and by telephone during all library service hours.
- \_\_\_\_\_ 10. The library district's lending policies easily facilitate the use of library materials, except those judged irreplaceable or needed in the collection for basic informational services.
- \_\_\_\_\_ 11. Materials not immediately available may be reserved for clients.
- \_\_\_\_\_ 12. The library district's circulation practices and policies provide for protection of client confidentiality.
- \_\_\_\_\_ 13. Library staff are knowledgeable about the library district's services and programs, lending regulations and circulation practices, and respond to the public in a courteous, helpful manner. A trained staff member is available to perform circulation services during all library service hours.
- \_\_\_\_\_ 14. The library district's circulation process provides accurate, reliable information about the materials collection. The circulation processes serve as an effective management system for citizen's use of materials.
- \_\_\_\_\_ 15. The library district keeps accurate, up-to-date records of citizens registered for library cards.
- \_\_\_\_\_ 16. The library provides timely response to information requests, as monitored through appropriate output measures.
- \_\_\_\_\_ 17. The library district provides access or referral for citizens to appropriate literacy training.
- \_\_\_\_\_ 18. The library district sets objectives for its programming activities and uses those objectives to evaluate the programs it offers.

# *Assessing a Library District's Effectiveness*

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Each library district will include in its planning process a description of the ways in which it will evaluate library services to determine their value to the citizens the library district serves. The evaluation of library services will focus on how well the library district meets citizens' needs for services, achieves the goals outlined in the library district's service plan, administers resources, and communicates library district services and accomplishments to citizens.

## **Standards**

1. The library district employs a variety of evaluation methods to assess its effectiveness in achieving its service plan.
2. Results of service evaluations are regularly reported to the library board and citizens of the service area.
3. Evaluation results are used in planning improvements to library services and in developing and revising the library district's long-range plans.

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## **Guidelines**

- \_\_\_\_\_ 1. The library district uses appropriate output measures to compile required statistics for the State Library reporting survey, Public Library Data Service, and the Federal Cooperative Library Systems Report.
- \_\_\_\_\_ 2. The library district collects statistics and conducts output measures, customer surveys, community studies, citizen surveys, and other means appropriate to the service program and resources of the library district.
- \_\_\_\_\_ 3. Both ongoing and new library services will include appropriate methods of evaluation and reporting of results.



# Collection and Resource Management

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A collection of materials is central to the purpose of every library. A library collection must serve a diverse range of existing and potential interests, needs and demands, and the nature of a public library's collection represents a compact with the community it serves. Communities will change over time, and library collections must be responsive to change. No set of standards can or should try to determine the values local libraries and their communities use to guide collection management choices. Given the importance of these choices, however, standards can be a powerful tool with which to set guidelines for good practice.

The collection should be conceived as a living entity. Decisions to add or withdraw an item from a library's collection must be subject to the same criteria. Each item in a collection represents a judgment in terms of its quality and usefulness, its contribution to the balance of the collection, and its responsiveness to community need and demand. In addition, decisions about the material owned by a library must be made within a context of knowledge concerning material that can be accessed by and provided to the public, but need not necessarily be owned by or physically present in the library. The primary purpose of these standards is to provide a means by which librarians can explicitly define and describe their collection management practices.

## Standards

### A. Collection Management

1. The library district has a written collection management policy that is based on the library district's service plan. The collection management policy is board approved and available to the public for comment and suggestions.
2. The collection management policy is reviewed regularly in the context of the evaluation of the library district's written service plan.
3. The library district provides for the continuous evaluation of the quality and responsiveness of the collection with regard to use and community need.

4. The act of materials selection and weeding is recognized as a professional responsibility and is conducted according to written selection and weeding criteria that are based on the principles articulated in the *ALA Intellectual Freedom Manual*.
5. The collection management policy demonstrates an awareness of the holdings of other area libraries accessible to the public. Public libraries are cognizant of the roles of academic and school libraries in supporting their own curriculums.
6. The library district has a written policy specifying that all requests for purchase or gifts to the library must meet the library district's selection criteria in order to be added to the collection.
7. The library district has a written policy detailing procedures for responding to requests that material be withdrawn from the collection. This policy is based on the Library Bill of Rights and the ALA Freedom to Read Statement and on other relevant documents in the *ALA Intellectual Freedom Manual*.

### B. Materials

1. The library district collects material in a variety of formats and media supported by a variety of information technologies. The library district has a written policy statement concerning priorities and limitations with regard to format, media, and technology that is specific to its own local community and collection management policy.
2. In order to serve community information needs, the library district maintains a current and adequate collection of reference materials in print, electronic, and other appropriate formats.
3. The library district budget contains a formal allocation of resources for library materials based on the collection development plan. This budget reflects the availability of access to information through the Internet and other electronic resources.

## Guidelines

- \_\_\_\_\_ 1. The collection management policy allows the library district to support clearly identified service priorities and defines level of collection management effort by specific subject areas or other needed specific categories.
- \_\_\_\_\_ 2. The public library does not undertake extensive curricular support unless the library district carefully defines its support of formal education within its service plan.
- \_\_\_\_\_ 3. Materials expenditures should be between 15% to 20% of the library district's operating budget.
- \_\_\_\_\_ 4. The library district uses the CREW manual or other reputable methods to maintain the currency and responsiveness of the collection to community needs.
- \_\_\_\_\_ 5. The library district recognizes the need for currency in rapidly changing subject areas such as science, medicine, technology, finance, and law.

# Physical Facilities

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The well-planned library building is efficiently organized for use by patrons and staff. It allows for flexibility in space utilization, accommodates technology, provides an inviting interior, and is designed around the service needs of the community as reflected in the long-range plan. The roles of the library in a particular community determine the type of physical facility required. There must be a welcoming atmosphere of freedom and openness which will encourage a wide segment of the population to use the library and regard it as an essential component of community life.

## Standards

1. The physical facility is adequate to carry out the library district's service plans.
2. Planning documents for library construction projects are based on a building program which includes: long-range plans, service needs, site analysis, and internal space analysis.
3. All library district buildings and building plans are in compliance with federal, state, and local laws including: fire, safety, sanitation, handicapped accessibility, energy conservation, and any other state and local codes or regulations.
4. Plans for new library construction or additions to existing buildings are designed by an architect certified to practice in Missouri. (RSMo 8.285 - 8.291) Engineers involved in construction projects are also certified by the State of Missouri.
5. The minimum number of parking spaces are provided according to local ordinances. Careful consideration should also be given to the use projections, the number of seating spaces provided, staffing levels, and the size of public meeting rooms. The actual needs will probably be far in excess of the minimum local codes.
6. Exterior lighting is sufficient to provide for the security of patrons and staff.

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## Guidelines

- \_\_\_\_\_ 1. Exterior signs are highly visible and include hours of service.
- \_\_\_\_\_ 2. The library district is listed in the local telephone directory and is equipped with enough incoming telephone lines to accommodate library needs.
- \_\_\_\_\_ 3. Light in the library building is evenly distributed and free of glare.
- \_\_\_\_\_ 4. For the comfort of public and staff as well as the protection of library materials, proper temperature and humidity control is maintained throughout the year.
- \_\_\_\_\_ 5. Heating, air conditioning, and lighting design are specifically designed to conserve energy.
- \_\_\_\_\_ 6. All library buildings and grounds are clean and well maintained.
- \_\_\_\_\_ 7. Interior signs are highly visible and comply with ADA guidelines as required.
- \_\_\_\_\_ 8. The building program is based on information collected from tools such as the Public Library Data Service and other appropriate guidelines for library buildings.
- \_\_\_\_\_ 9. The library director consults with other librarians and visits other sites where a similar project is in process or has just been completed. Library consultants and other experts are used when appropriate.

- \_\_\_\_\_ 10. In the absence of any other building codes, the library district follows Building Officials and Code Administrators international (BOCA) codes.
- \_\_\_\_\_ 11. At least every five years, the library director, with input from the staff, completes and shares with the board a written space needs assessment based on the following:
  - a. current space requirements
  - b. the most recent community analysis
  - c. estimated changes in technology, size of collection, and types of materials

# *Technology in the Public Library*

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Technological applications enhance library service in many ways. Local libraries are the central point of access to information for their constituents and are uniquely qualified to add value back to their communities through the delivery of current, accurate, well-organized, extensive information. Library automation and technological applications are continually changing. No longer is the library limited to the resources within a particular facility; access to information, not ownership, is the primary focus. Electronic information systems complement, rather than dramatically displace, traditional materials in libraries.

Technology continues to change and improve cooperative efforts among libraries, most importantly their ability to share resources. It is critical that libraries provide online connectivity to the myriad products available. The library can be envisioned as evolving into an online information utility that provides users with access to local computer systems and acts as a gateway to remote systems. The search for information is rapidly moving from locally held sources to those available globally.

## **Standards**

### **A. Library Automated Systems**

An integrated library automation system is designed around a database of machine readable (MARC) bibliographic records for all types of library materials. The long-term goal in the catalog information system is to make information about remote library collections as accessible to the user as information about the local library district collection. Integrated online library automation systems are used to unify local collections, provide access to resources outside the library, and incorporate reference works and full-text services. They can provide a variety of specific functions such as cataloging, circulation, authority control, acquisitions, serials control, reserves, interlibrary loan, and electronic mail. They can also provide access to databases such as local community information files or external information databases through direct tape load, CD-ROM networks, or dial-up access.

1. The decision to automate is based on community needs and is included in the written long-range plan.
2. When a public library is automated, all cataloged materials in its collections are included in the database.
3. The system design is focused on a commitment to open architecture, considering resource sharing as well as on- and off-site public access.

### **B. Electronic Information Systems**

Telecommunications access for on- and off-site users is an essential component of the strategic plan of every public library district. These systems provide users with access to a growing variety of reference and source materials in digital form. Telecommunications (allowing computers and fax machines to communicate via telephone services) provide access to the Internet, automated interlibrary loan, online databases such as indexes and abstracts or full-text journals and newspapers, electronic mail, and fax services. Libraries need computer hardware, software, trained staff, and a fax machine for document delivery in order to participate. A goal for every library district in Missouri is direct access to multiple online resources through a statewide network.

1. The library district participates in statewide telecommunications networks.
2. The library district has the basic hardware required to participate in statewide telecommunications networks.
3. The library district has Internet access.
4. The library district budgets for and provides the essential technology required for the electronic delivery of information.
5. As technological needs change, the library acquires the new hardware necessary to maintain effective electronic access.
6. Staff is adequately trained to access electronic information.
7. The library district is proactive in developing local electronic networks for resource sharing.

## Guidelines

- \_\_\_\_\_ 1. A written strategic plan includes information about the decision to automate.
- \_\_\_\_\_ 2. When the library is automated, all cataloged materials in its collection are included in the database.
- \_\_\_\_\_ 3. The library catalog information system allows on- and off-site public access.
- \_\_\_\_\_ 4. Access to remote library collections is included in the automation plan. The library carefully weighs the advantages of the Z39.50 protocol or succeeding American National Standards Institute standards in order to increase communication abilities and provide easy access to information no matter where it exists.
- \_\_\_\_\_ 5. Collection development plans include access to information in a variety of electronic formats that complement traditional collections.
- \_\_\_\_\_ 6. The library district participates in statewide telecommunications networks.
- \_\_\_\_\_ 7. Selection of electronic databases is based on a written collection development plan which includes standards of performance and quality of information.
- \_\_\_\_\_ 8. The library district has Internet access.
- \_\_\_\_\_ 9. The library staff is adequately trained to access electronic information.
- \_\_\_\_\_ 10. The library district works in cooperation with other organizations to develop electronic networks for resource sharing.
- \_\_\_\_\_ 11. The library district provides the basic hardware to participate in statewide telecommunication networks, such as:
  - a. telephone
  - b. fax machine
  - c. photocopier
  - d. computer
  - e. modem

# Technical Services

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The purpose of a technical services department is to make all library materials easily accessible to users, other departments, and other libraries. The technical services department acquires, catalogs, classifies, and processes books and other materials promptly and efficiently and maintains well-organized catalogs and files.

## Standards

1. Materials are cataloged using the most current edition of the national standard accepted by the State of Missouri.
  2. Cataloging records are acquired from a reputable source.
  3. The library's catalog is stored in electronic format. The records of the collection are machine readable using MARC format and are submitted to the state union catalog to enable resource sharing.
  4. The serials list is submitted for inclusion in the state centralized catalog in the acceptable format.
  5. The catalog accurately reflects the library district's holdings. Changes in records are regularly submitted to the state union catalog.
  6. Materials are processed and made available to the public in a timely manner.
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## Guidelines

- \_\_\_\_\_ 1. The national standard accepted by the State of Missouri is currently AACRII.
- \_\_\_\_\_ 2. On- and off-site methods of processing are evaluated for cost effectiveness and suitability for the library's needs. Some reputable sources for cataloging records include OCLC, Bibliofile, and LaserQuest.
- \_\_\_\_\_ 3. The staff is well trained and knowledgeable about cataloging and the ways in which the public uses catalogs.
- \_\_\_\_\_ 4. The staff verifies orders to prevent expenditures for unwanted duplicates.
- \_\_\_\_\_ 5. The staff keeps records of materials on order, checking periodically on back orders and special requests.
- \_\_\_\_\_ 6. The integrity of the catalog is maintained by deleting entries of withdrawn and lost items in a timely manner.
- \_\_\_\_\_ 7. A written methodology for maintaining the collection—restocking, weeding, upgrading—applies to all portions of the collection.
- \_\_\_\_\_ 8. Sufficient directions are present to make the public catalog easy to use.
- \_\_\_\_\_ 9. Catalog entries are understandable, legible, and consistent in format.
- \_\_\_\_\_ 10. The catalog contains sufficient and current “see” and “see also” references to help the public.
- \_\_\_\_\_ 11. Locations of items are clearly indicated.
- \_\_\_\_\_ 12. Temporary locations, such as the new book shelf, are indicated in the catalog.

- \_\_\_\_\_ 13. Public service staff members are kept informed of current trends or changes in classification, cataloging, and subject headings.
- \_\_\_\_\_ 14. Items for which users are waiting or items requested by staff for programs or displays are identified, given priority, and rushed through the acquisitions and cataloging process.
- \_\_\_\_\_ 15. All materials are processed and labeled clearly and accurately.
- \_\_\_\_\_ 16. Materials are maintained through an ongoing program of mending, rebinding, or replacement.



# Cooperative Activities

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Cooperation is a vital part of library operations. The library district looks for opportunities to cooperate with other public libraries, other types of libraries, other governmental agencies, non-profit agencies, and the private sector in an attempt to offer the highest caliber of service to the user population.

## Standards

1. The library district participates in statewide

or regional opportunities to share information and resources.

2. The library district provides interlibrary loan services to library users and other agencies.
3. The library district cooperates with other agencies when possible and when appropriate to the library district's service plan.

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## Guidelines

- \_\_\_\_\_ 1. Cooperation within the library community may include sharing of:

- a. bibliographic information
- b. staff expertise
- c. training opportunities
- d. equipment
- e. computer services
- f. other joint activities

- \_\_\_\_\_ 2. The board encourages and enables cooperative agreements by the library district with other information providers, such as:

- a. local governments
- b. community organizations, agencies, and institutions
- c. regional and state groups

- \_\_\_\_\_ 3. The board encourages cooperative agreements between the library district and other local government agencies for shared services such as:

- a. cooperative purchasing
- b. shared maintenance agreements
- c. personnel management costs and benefits
- d. bookkeeping and accounting

- \_\_\_\_\_ 4. The library is represented at meetings of community organizations and groups, including but not limited to:

- a. the educational community
- b. social service agencies
- c. arts councils
- d. intergovernmental agencies
- e. private sector organizations such as chambers of commerce and economic development, etc.

- \_\_\_\_\_ 5. The board encourages and enables participation by the library staff in community organizations and civic groups.

# Implementation Plan

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The interest of the residents of Missouri is best served by creating an implementation plan which calls for the standards to be phased in over time. To allow for further input from the library community, the State Library held a series of regional "Talk Sessions" throughout the state.

After this information was evaluated, the Library Development Team of the Missouri State Library began the development of an implementation plan for the standards. After a detailed examination of the document, it was apparent the standards could be divided into three distinct tracks. Because of the need for planning to achieve the level of service due library users, it was determined the standards would be implemented on the following tracks:

## Track 1

This track includes standards which do not require significant additional funding but will involve a commitment of time and effort on the part of the library director and board of trustees:

- ◆ Development of bylaws and policies
- ◆ Creation of plans for collection management, public service and technology

## Track 2

The standards in this track seem to be in conflict with existing statutes. They will require revision of the statutes or the standards. Planning

will soon begin for those revisions, but this process will require a significant amount of time before the implementation can begin.

## Track 3

These standards require significant additional funding and will necessitate long range planning at the local and state level to achieve the financial support needed to move libraries to this level of service.

This plan was referred to the Secretary of State's Council on Library Development. The Council saw the need for public library standards and discussed the state library plan for an assessment of Missouri public libraries, with regard to the standards. The Council sent a recommendation to Secretary of State Bekki Cook for implementation of the first two tracks but suggested deferring any action on the third track at this time.

Secretary Cook accepted the Council's recommendation and adopted the standards as a policy of best practice. The standards will be phased in with continuing education programs which will assist libraries in making progress toward meeting the standards. For the present, the standards will serve as a guide to providing excellence in public library service. The assessment process began this year. As the data is analyzed, the State Library will use it to plan and coordinate continuing education offerings for the public library community.

# *Public Library Standards Implementation*

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(Number refers to the number in the standards document)

## **Track 1**

### **Structure, Governance and Administration, p. 3**

1. The first priority of the board is to guarantee that all residents of the library district have access to tax-supported public library services.
2. The board establishes goals and objectives and adopts bylaws, rules and regulations for its own guidance and for the governance, maintenance and function of the library district.
3. Policies approved by the board are written and are available for public inspection.
4. The library district has a written mission statement which clearly defines the purpose of the public library in its community. The library district has written plans for long-range planning, collection development, public services, and other areas as necessary. The plans state goals and objectives for improvement of library services and are available for public inspection.
5. The board employs the library director, provides for the continuing development and evaluation of the director, and delegates active management of the library district to the director. Board members must not be involved in the day-to-day operation of the library.
6. The board sets and approves the library district budget.
7. Board meetings are held as specified in the bylaws, at a time and place convenient for the board and for the community, in accordance with Missouri state law on public meetings. The library director must attend.
8. The board complies with Missouri law and any federal laws which affect library operations. Trustees and library staff should actively participate in the legislative process to effect change that will benefit library users.
9. The board must assure that adequate records and statistics on library operation are kept.

## **Finance, p. 7**

2. The library district follows fiscal procedures consistent with state law in preparing, presenting and administering its budget.

## **Personnel, p. 8**

2. The director is responsible for employing qualified personnel to fulfill the mission of the library district.
3. The library district has written personnel policies and procedures.
5. Volunteer programs have written policies, procedures and job descriptions that explain and govern the role of all volunteers.
6. The library personnel policies comply with federal and state laws and encourage diversity.

## **Public Library Services, p. 10**

1. The library district has a written service plan to meet community needs, developed by the board and staff with input from the community.
3. The library district has a written lending policy which specifies freedom of access, types of materials which are loaned, citizen eligibility for library borrowing privileges, and requirements for those residing outside library district boundaries.

## **Assessing a Library District's Effectiveness, p. 12**

1. The library district employs a variety of evaluation methods to assess its effectiveness in achieving its service plan.
2. Results of service evaluations are regularly reported to the library board and citizens of the service area.
3. Evaluation results are used in planning improvements to library services and in developing and revising the library district's long-range plans.

## Collection and Resource Management, p. 13

### A. Collection Management

1. The library district has a written collection management policy that is based on the library district's service plan. The collection management policy is board approved and available to the public for comment and suggestions.
2. The collection management policy is reviewed regularly in the context of the evaluation of the library district's written service plan.
3. The library district provides for the continuous evaluation of the quality and responsiveness of the collection with regard to use and community need.
4. The act of materials selection and weeding is recognized as a professional responsibility and is conducted according to written selection and weeding criteria that are based on the principles articulated in the ALA *Intellectual Freedom Manual*.
5. The collection management policy demonstrates an awareness of the holdings of other area libraries accessible to the public. Public libraries are cognizant of the roles of academic and school libraries in supporting their own curriculums.
6. The library district has a written policy specifying that all requests for purchase or gifts to the library must meet the library district's selection criteria in order to be added to the collection.
7. The library district has a written policy detailing procedures for responding to requests that material be withdrawn from the collection. This policy is based on the Library Bill of Rights and the ALA Freedom to Read Statement and on other relevant documents in the ALA *Intellectual Freedom Manual*.

### B. Materials

1. The library district budget contains a formal allocation of resources for library materials

based on the collection development plan. This budget reflects the availability of access to information through the Internet and other electronic resources.

## Physical Facilities, p. 15

2. Planning documents for library construction projects are based on a building program which includes: long-range plans, service needs, site analysis, and internal space analysis.

## Technology in the Public Library, p. 17

### A. Library Automated Systems

1. The decision to automate is based on community needs and is included in the long-range plan.

## Technical Services, p. 19

1. Materials are cataloged using the most current edition of the national standard accepted by the State of Missouri.
4. The serials list is submitted for inclusion in the state centralized catalog in the acceptable format.
6. Materials are processed and made available to the public in a timely manner.

## Cooperative Activities, p. 21

3. The library district cooperates with other agencies when possible and when appropriate to the library district's service plan.

## Track 2

## Finance, p. 7

1. The library district has a minimum tax rate of \$.15 per hundred dollars of assessed valu-

ation, or a minimum per capita support of \$15.00 per capita from all local funds.

3. The library district is annually audited by an independent C.P.A. firm with experience in governmental accounting.

## Personnel, p. 8

1. The library board is responsible for hiring a paid, qualified director, or administrative officer, for the library district. Normally, this position is filled by a person with a Master of Library Science degree from a program accredited by the American Library Association. (See Library Director Requirements)

## Track 3

## Finance, p. 7

1. The library district has a minimum tax rate of \$.15 per hundred dollars of assessed valuation, or a minimum per capita support of \$15.00 per capita from all local funds.
4. The library district has insurance adequate to protect the district and its public.

## Personnel, p. 8

1. The library board is responsible for hiring a paid, qualified director, or administrative officer, for the library district. Normally, this position is filled by a person with a Master of Library Science degree from a program accredited by the American Library Association. (See Library Director Requirements).
4. Staff development and continuing education opportunities are regularly available to all staff members.

## Public Library Services, p. 10

2. Library hours are set to meet community needs and include morning, afternoon,

evening and weekend hours each week. Full library services are available to all individuals regardless of age.

4. The library district provides services using the information technology, whether print-based or electronic, that is most appropriate to the user's needs, regardless of the user's age.

## Collection Management, p. 13

### *B. Materials*

1. The library district collects material in a variety of formats and media supported by a variety of information technologies. The library district has a written policy statement concerning priorities and limitations with regard to format, media and technology that is specific to its own local community and collection management policy.
2. In order to service community information needs, the library district maintains a current and adequate collection of reference materials in print, electronic, and other appropriate formats.

## Physical Facilities, p. 15

1. The physical facility is adequate to carry out the library district's service plans.
3. All library district buildings and building plans are in compliance with federal, state and local laws including: fire, safety, sanitation, handicapped accessibility, energy conservation, and any other state and local codes or regulations.
4. Plans for new library construction or additions to existing buildings are designed by an architect certified to practice in Missouri. (RSMo 8.285-8.291) Engineers involved in construction projects must also be certified by the State of Missouri.
5. The minimum number of parking spaces are provided according to local ordinances. Careful consideration should also be given to the use projections, the number of seating spaces

provided, staffing levels, and the size of public meeting rooms. The actual needs will probably be far in excess of the minimum local codes.

6. Exterior lighting is sufficient to provide for the security of patrons and staff.

## Technology, p. 17

### **A. Library Automated Systems**

2. When a public library is automated, all cataloged materials in its collections are included in the database.
3. The system design is focused on a commitment to open architecture, considering resource sharing as well as on- and off-site public access.

### **B. Electronic Information Systems**

1. The library district participates in statewide telecommunications networks.
2. The library district has the basic hardware required to participate in statewide telecommunications networks.
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2. Cataloging records are acquired from a reputable source.
3. The library's catalog is stored in electronic format. The records of the collection are machine readable using MARC format and are submitted to the state union catalog to enable resource sharing.
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## Cooperative Activities, p. 21

1. The library district participates in statewide or regional opportunities to share information and resources.
2. The library district provides interlibrary loan services to library users and other agencies.

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